

EXAMINER'S AMENDMENT

1. An examiner's amendment to the record appears below. Should the changes and/or additions be unacceptable to applicant, an amendment may be filed as provided by 37 CFR 1.312. To ensure consideration of such an amendment, it MUST be submitted no later than the payment of the issue fee.

Authorization for this examiner's amendment was given in a telephone interview with Meghan Toner on 4/7/11.

The application has been amended as follows:

Claim 1 is amended as follows:

1. A customer relationship management (CRM) system that is accessible via a network, comprising:

a computer system, comprising at least one computing device, the computer system including:

a user interface that provides distributed access for customers and support providers to case information within the CRM system, wherein the customers and the support providers are separate and distinct institutions; and wherein the user interface provides access to both customers and support providers to a customer case management page for viewing all cases opened for a given customer and a case summary page for viewing details of individual cases stored within the CRM system;

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wherein a customer case includes a request from the customer to the support provider for support;

a case management system for managing customer cases, wherein the case management system includes a system for assigning cases to different tiers within a support provider hierarchy, determining whether an assigned tier can resolve the case, and escalating the case to a different tier in response to a determination that the assigned tier cannot resolve the case; and

a compliance tracking system that retrieves previously loaded customer compliance data from a database; wherein the compliance data consists of information related to whether a customer has met certain required pre-set goals set by the CRM system, compares the compliance data for each customer with predetermined levels to determine customer compliance, provides a compliance indicator on the customer case management page that indicates whether a compliance issue exists, and escalates the case to a different tier in response to an existence of a compliance issue.

Claim 10 is amended as follows:

10. A method for providing customer relationship management (CRM) via a computer network, comprising:

providing a network node that allows distributed access for customers and support providers to a CRM system using a computer system, comprising at least one

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computing device, wherein the customers and the support providers

are separate and distinct institutions;

opening a new case within the CRM system when a customer issue occurs using the computer system;

wherein the customer issue includes a request from the customer to the support provider for support;

adding the new case to a customer case management page using the computer system; wherein both

customers and support providers have access to the customer case management page;

displaying a compliance indicator when the customer case management page is viewed using the computer system; wherein the compliance indicator indicates whether a compliance issue exists

and is based on information related to whether a customer has met certain required pre-

set goals set by the CRM system,

assigning the new case to a first tier support provider using the computer system;

determining whether the first tier support provider can handle the new case using the computer system; and

escalating the new case to a second tier support provider in the case that the first tier support

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provider cannot handle the case or if a compliance issue exists using the computer system.

Claim 13 is amended as follows:

13. The method of claim 10, comprising the further step of generating email notifications according to a set of business rules using the computer system.

Claim 14 is amended as follows:

14. The method of claim 10, comprising the further step of having an assigned support provider check out the case from the CRM system using the computer system.

Claim 18 is amended as follows:

18. A program product stored on a recordable storage medium that provides a customer relationship management (CRM) tool via the web, comprising:

a portal page for providing distributed access on the web for customers and support providers to case information within the CRM tool, wherein the customers and the support providers are separate and distinct institutions; and wherein the portal page provides access to a customer case management page for viewing all cases opened for a given customer and a case summary page for viewing details of individual cases, wherein both customers and support providers have access to the customer case

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management page and the case summary page; wherein a customer case includes a request from the customer to the support provider for support;

a customer management module for managing customer cases and for assigning cases to different tiers within a support provider hierarchy; and

a customer compliance module that retrieves previously loaded customer compliance data from a database; wherein the compliance data consists of information related to whether a customer has met certain required pre-set goals set by the CRM system, compares the compliance data for each customer with predetermined levels to track customer compliance and displays a compliance indicator on the customer case management page that indicates whether a compliance issue exists, and escalates the case to a different tier in response to an existence of a compliance issue.

Allowable Subject Matter

2. Claims 1-26 are allowed.
3. Since allowable subject matter has been indicated, applicant is encouraged to submit formal drawings in response to this Office Action. The early submission of formal drawings will permit the Office to review the drawings for acceptability and to

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resolve any informalities remaining therein before the application is passed to issue.

This will avoid possible delays in the issue process.

4. The following is an examiner's statement of reasons for allowance. None of the prior art of record either individually or in combination teach the following:

-A customer relationship management (CRM) system that is accessible via a network, comprising a case management system for managing customer cases, wherein the case management system includes a system for assigning cases to different tiers within a support provider hierarchy, determining whether an assigned tier can resolve the case, and escalating the case to a different tier in response to a determination that the assigned tier cannot resolve the case.

The present invention discloses a customer relationship management (CRM) system that is accessible via a network. The first allowable feature of providing a case management system for managing customer cases, wherein the case management system includes a system for assigning cases to different tiers within a support provider hierarchy, determining whether an assigned tier can resolve the case, and escalating the case to a different tier in response to a determination that the assigned tier cannot resolve the case is not disclosed by any prior art reference. The closest prior art, Lurie (US 20090063246 A1) shows an apparatus and method for online advice customer relationship management are described. The method includes the determination of a service provider ID code from a requesting service provider. Once a service provider ID code is determined, a list of service seekers that have received advice regarding a field of service from a service provider corresponding to the service provider ID code is

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generated. Once generated, the listing of service seekers is displayed via a customer management screen. The next closest prior art, Chaddha et al (US 20060293942 A1) discloses an apparatus, and associated methods, manage technology resources in hosted applications including: demand, service level agreements, assets both hardware and software, projects, labor, knowledge and provisioning. The apparatus includes an asset manager configured to couple to host servers and a network, to manage the host servers and software deployed thereon. In embodiments of the invention the asset manager: determines demand for new assets and allocates available assets to meet the demand; determines assets not in compliance with existing software licenses; determines which host servers have actual service level metrics which are not compliant with the target service level metrics; and determines availability of a patch or upgrade for selected software and instances of the selected software among the assets. The next closest prior art, Mikurak (US 7130807) discloses a system for supplying collaborative planning by a computerized framework manager. Steps include furnishing network connections and collecting supply and demand information from business entities. Such information is analyzed and used to facilitate planning among the business entities. The network provides data access for multiple data sources and the network is used to store capacity data. The computerized framework manager conducts reverse inventory management of the business entities through the collection of data; analysis of data is then used to predict future demand, and predicted future demand is used to forecast costs to manufacturers, from which suggestions regarding optimization is made. Newly cited art, Harper et al (WO 2004107094 A2) discloses a data

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integration system that comprises a data correlation system and method that correlates data records collected from disparate Customer Relationship Management (CRM) applications using a three-tier approach comprising deterministic correlation, heuristic correlation and historical correlation. Newly cited art, Shen et al's "WAP mail and Short Messaging Service for Mobile CRM" discloses utilizing a mobile device for CRM (Customer Relationship Management) access and control. However, Lurie, Chaddha et al, Mikurak, Harper et al and Shen et al all fail to disclose the feature of providing a customer relationship management (CRM) system that is accessible via a network, comprising a case management system for managing customer cases, wherein the case management system includes a system for assigning cases to different tiers within a support provider hierarchy, determining whether an assigned tier can resolve the case, and escalating the case to a different tier in response to a determination that the assigned tier cannot resolve the case. This distinct feature has been added to independent claims 1, 10 and 18, and renders them and all claims that depend from them allowable.

Any comments considered necessary by applicant must be submitted no later than the payment of the issue fee and, to avoid processing delays, should preferably accompany the issue fee. Such submissions should be clearly labeled "Comments on Statement of Reasons for Allowance."

Conclusion

5. Any inquiry concerning this communication or earlier communications from the examiner should be directed to Akiba K Robinson-Boyce whose telephone number is 571-272-6734. The examiner can normally be reached on Monday-Friday 9am-5:30pm.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, John Hayes can be reached on 571-272-6708. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the

•Patent Application Information Retrieval (PAIR) system, Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

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Any inquiry of a general nature or relating to the status of this application or proceeding should be directed to the receptionist whose telephone number is 703-305-3900.

A. R. B.
April 12, 2011

/Akiba K Robinson-Boyce/
Primary Examiner, Art Unit 3628